

The Future Financial Planning Process

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This Program qualifies for CFP Board of Standards CE credits (100 min = 2 hours credit). Learn how recent changes to the CFP Board's rules can actually make it easier and more efficient to produce a financial plan for your clients. This program takes a revolutionary new approach to planning, integrating risk assessment, stochastic modeling and goal attainment probability factors into an efficient and quick plan production process that covers all the basics while creating a sensible deliverable that clients can understand and use.